# Shared Services e+ Email Project

## email plus more

# Quality Assurance Report – Initial Assessment

This plan was independently prepared by Briskin Consulting and its associates in accordance with State of Washington Information Services Board policies governing independent quality assurance of Washington State information technology projects.

*Porsche Everson*

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**September 6, 2011**

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# Quality Assurance Assessment

### Project Vision

The Shared Services Email Project's vision is to maximize email capabilities and functionality available to all agencies and to provide email as a shared service, thus reducing cost and risk. The vision includes the following functions:

- Hosted email services
- Vault email retention
- Secure email
- Remote and mobile email access
- Interfaces with state agency applications that use email
- Service level agreements and high customer satisfaction
- Future extensibility

This initiative includes executive branch agencies and will also be available to other state government agencies. The outcome will be a single source solution hosted in the state's data center.
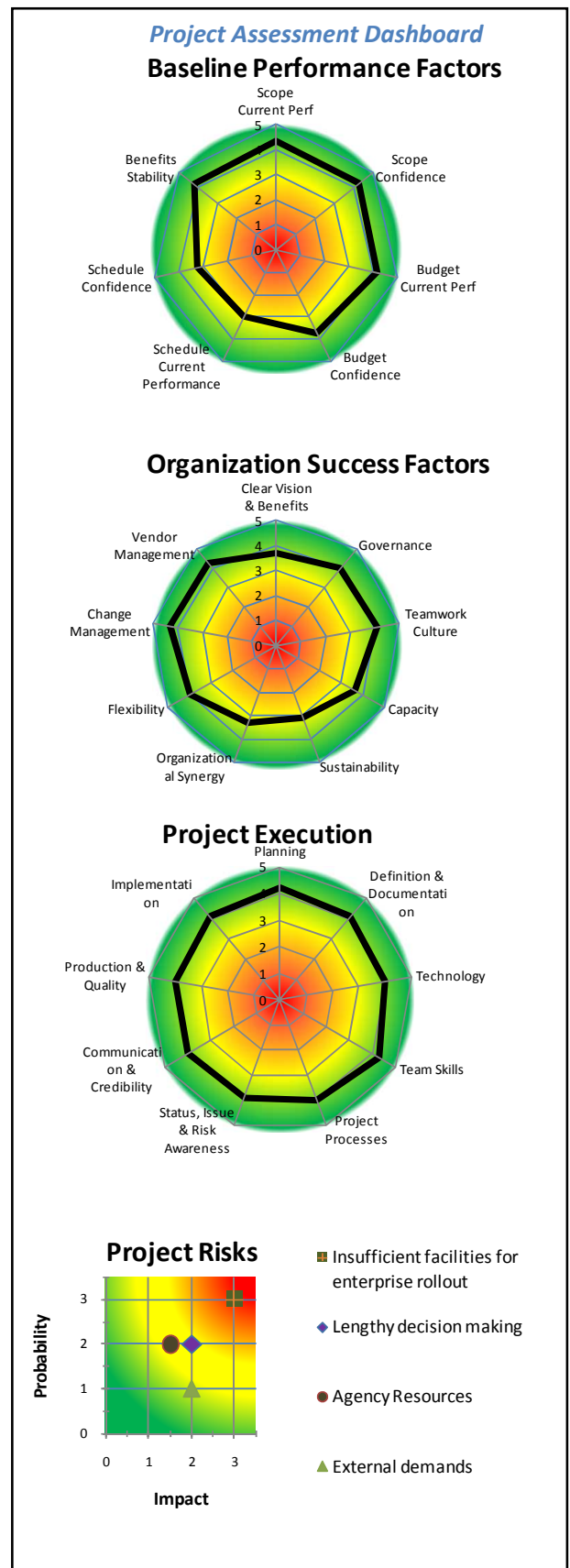
The overall purpose behind the project is to optimize the value of IT by concentrating email services across state agencies to a centralized service to lower costs and improve service.

### Status Overview

The project's overall status is GREEN. The project is generally on schedule, with the exception of the Secure Email RFP, which will be addressed later in more detail. The project is under budget and tracking close to planned expenditures. Scope is actively managed, with only one change order to date: implementation of ActiveSync services, which has very strong customer support. There has been no reduction in scope from the original charter.

Agency migrations are in full gear. Almost all agencies are scheduled for mailbox migration. Project processes and controls are strong. The executive sponsor is actively engaged, and DIS has professional project management in place. The project is sufficiently staffed.

Project staff are using continuous process improvement to ensure upcoming migrations benefit from lessons learned. The project is using industry standard infrastructure and formal project management.

*Project Assessment Dashboard*

**Baseline Performance Factors**

**Organization Success Factors**

**Project Execution**

**Project Risks**

- Insufficient facilities for enterprise rollout
- Lengthy decision making
- Agency Resources
- External demands

**Quality Assurance Initial Assessment – DIS Shared Services Email Project**

There are no significant QA findings in this initial assessment. Briskin Consulting does have, however, a few recommendations, which are listed below.

1. Carefully monitor migration progress, especially in September and October to ensure that the project meets projections. Ensure the project team has a good understanding of the impact of any delays in one part of the schedule on commitments to agencies. Provide adequate buffers, to the extent possible, to avoid schedule disruptions.
2. Update the project charter to clarify project benefits and bring into alignment with Service Level Agreement.
3. Ensure that sufficient knowledge transfer is occurring between contracted vendors and DIS.[1]
4. Recommend that Maintenance and Operations staff gather, monitor and address service metrics as identified in the Service Level Agreement on a regular basis to ensure that their capacity for support is sufficient, given the high volume of planned mailbox migrations in the next four months.
5. Initiate periodic formal risk and issue assessment meetings.

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[1] There are no current issues identified related to knowledge transfer. This recommendation serves as a best practice reminder to ensure that knowledge transfer is ongoing throughout the project.

**DIS Success Factors**

The Washington State Information Services Board (ISB) and DIS provide a framework for project management. Through evaluation of hundreds of projects, evaluation and research, ISB has established a concise list of critical success factors that predict project success. See http://isb.wa.gov/policies/300r.pdf for more information. This framework provides a quick overall dashboard of the project success potential.

The overall QA analysis presented in this report is deeply rooted in this framework, and goes beyond this high level project review.



**DIS Success Factors**
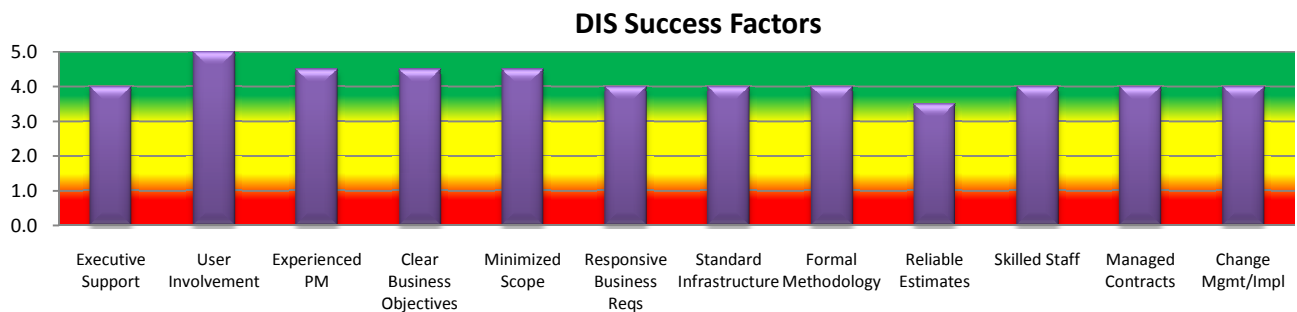
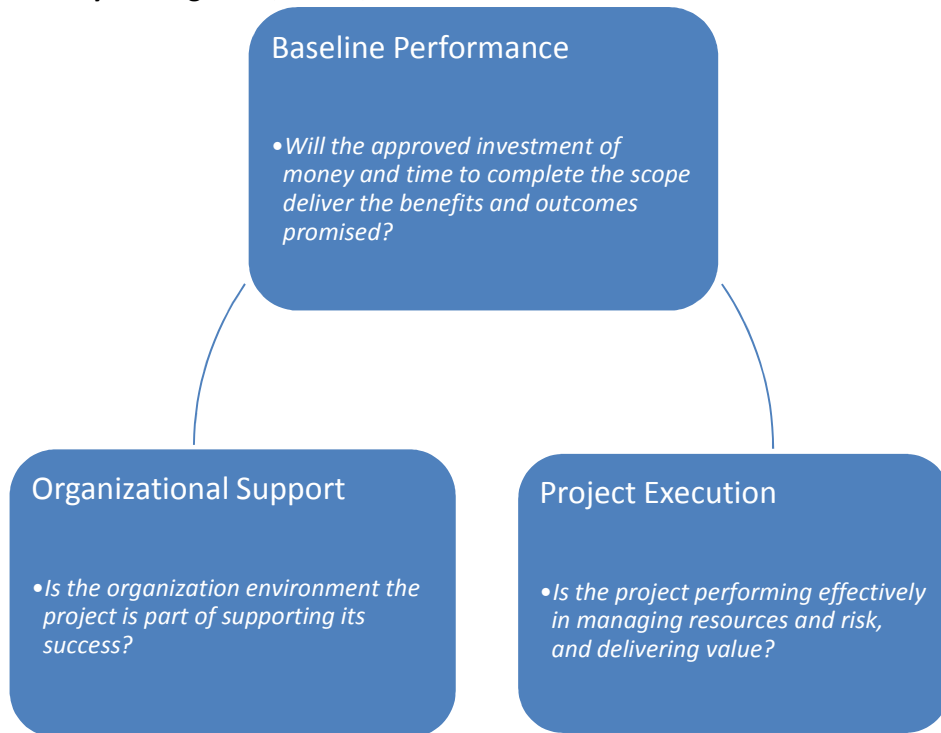| Department of Information Services Success Factors | Rating | Observation |
|---|---|---|
| Executive Management Support | 4.0 | Project Sponsor is actively involved. DIS Director receives regular briefings. |
| User Involvement | 5.0 | The project is seeking out user input through multiple channels. There are several pre- and post-conversion meetings with liaisons. Project Steering Committee. ETAG, CAB and other meetings show active involvement in the project. |
| Experienced Project Manager | 4.5 | Project Manager has sufficient experience to handle project of this size and complexity. |
| Clear Business Objectives | 4.5 | The project has clear and limited business objectives. Users and the project team understand those objectives. |
| Minimized Scope | 4.5 | There is no evidence of any pressure to increase scope (outside of pending change order), and the project itself has a well-defined scope. |
| Responsive Business Requirements Process | 4.0 | The project leadership regularly seeks input from customers about business requirements related to service needs and application integration. A proposed change order takes into account the largest request from the user community - to include ActiveSync support. |
| Standard Infrastructure | 4.0 | The project is using industry standard applications, hardware, and configurations for the hosted environment. |

| | | |
|---|---|---|
| Formal Methodology | 4.0 | The project makes use of formal project management methodology for schedule, scope, budget, risk, issue and quality management. |
| Reliable Estimates | 3.5 | Recent estimates for email migration schedule took into account direct agency input and planning. |
| Skilled Staff | 4.0 | Technical, business, project and vendor staff seem competent in their areas of responsibility. No issues are apparent. |
| Managed Contracts | 4.0 | Contracts are professionally managed. RFP process for Secure Email services was professional and inclusive. |
| Change Management/ Implementation | 4.0 | There is one pending change request (ActiveSync), which is being formally managed. Implementation is very strong. |

**QA Findings and Recommendations**

There are no significant findings during the initial assessment of the project. However, Briskin Consulting has some recommendations, which are detailed in the QA Commentary below.

**QA Commentary – Background, Status, Forecasts**



Baseline Performance
- *Will the approved investment of money and time to complete the scope deliver the benefits and outcomes promised?*

Organizational Support
- *Is the organization environment the project is part of supporting its success?*

Project Execution
- *Is the project performing effectively in managing resources and risk, and delivering value?*

**Baseline performance** for the project is strong. The project is generally on schedule according to the current plan, with the exception of the Secure Email RFP. Five vendors responded to the initial RFP. One was administratively disqualified, and three of the remaining four did not fill out the cost proposal section correctly. After careful deliberation, the project leadership decided to cancel and re-issue the RFP, in order to obtain better quality proposals from the vendor community. The re-issue is pending.

The migrations are moderately behind schedule, but recent commitments from the participating agencies should enable better estimates of when the email migrations will occur. To avoid the risk of email changes during the legislative session, agencies are pushing to migrate mailboxes between September and December 2011. Approximately 72% of all the project's migrations are scheduled during this time. This concentration of effort raises schedule risk. Early evidence seems to indicate that the project may not complete all the migrations scheduled for September, which reduces confidence in the schedule. Briskin Consulting recommends close monitoring of the schedule over the next few months.

**Organizational support** is evident. The team is working together well and coordinates their work. The team has stand-up check-in meetings nearly every day. Handoffs between planning, implementation and ongoing support efforts are efficient. Governance, including regular briefings to project executives and monthly Project Steering Committee meetings are going well, and show evidence of active involvement from both executives and customers. Organizational change management has strong support. DIS provides liaisons to work with agencies early in the process to understand the business impacts of converting to shared services email. The liaisons help with all aspects of planning, including helping with policy development related to

records retention, acceptable use, and other standard policies related to agency email functions. DIS is completing their transition to Consolidated Technology Services (CTS) and relocating to a new building, neither of which appears to have a significant impact on the project team and schedule.

**Project execution** is appears effective, with ample evidence of professional project management and oversight. The project has an actively managed plan and implementation schedule. The schedule is realistic and detailed, and is iteratively updated so that estimates improve in accuracy over time. For the most part, team skills include business as well as technical skills, and team members are adept at problem solving. The team is empowered to address issues at the lowest level possible, and individuals communicate effectively within the team. External contractors are working effectively and collaborating well with DIS project staff.

Some concerns exist, which are detailed below.

There is evidence of concern among the customers about DIS' ability to support hosted email and related services with sufficient up-time to meet service level agreements and/or customer expectations. There have been two significant service outages since July 1, both unrelated to the actual email system, but which impacted the email system. From the end user's perspective, they have a hard time understanding that the outage had nothing to do with the new shared services email system. They only know that their email was down. DIS has done a good job communicating the root causes of the outages to their customers.

Implementation progress is below projections. This may result in a large backlog later in the project that may be difficult to complete. As of August 31, the project has migrated about 50% of the 10,000 mailboxes planned to be completed at this time. Between September and December 2011, 72% of the total mailboxes are scheduled for migration, a huge volume to absorb in a short period of time. The project depends on agency cooperation to meet the implementation schedule, which is a project risk factor. Early indications show that the project may not meet September projections, which is a cause for concern.

There have been a few issues with individual agency implementations that have interrupted a smooth transition, resulting in temporary loss of services or other access issues. The project team has addressed all of those issues in a timely manner. The vast majority of those issues were traced back to incomplete preparation on the part of the agency. As a result, DIS has invested additional time and effort improving the agency pre-cutover and cutover checklists, and now works proactively with each agency to ensure that all steps are completed prior to the actual migration process. DIS is actively soliciting agency feedback, and incorporates that feedback into subsequent migrations. Improvement is evident.

Some agencies expressed initial concerns about the hosting costs. Essentially, it did not appear to them that there was any cost savings in a shared services hosted model. This concern is somewhat unwarranted, because in most instances, the true cost of providing email services at the agency level was so deeply embedded in other costs that it was not possible to compare true existing costs to projected costs for the hosted solution. Further, the hosting cost model includes additional services like records retention, email filtering, and secure email solutions, which may not have been available to many of the agencies prior to this project.

Vault repository services are still being defined, with a planned September implementation. Secure email services are pending as well. Some individuals have expressed a concern that agencies have a more complex implementation pathway with multiple installations, initially for email, and subsequently for vault services and secure email. This concern may be valid, but on the other hand, incremental implementation may reduce risk and improve user acceptance.

Some agencies have expressed a desire to purchase email services in an ala carte mode, but the current DIS pricing model has limited options for purchasing services – limited or full service. We recognize this as a rational business decision at the enterprise level, and have no comments or recommendations on the pricing model selected by DIS.

Briskin Consulting recommendations are detailed below.

1. Carefully monitor migration progress, especially in September and October to ensure that the project meets projections. Ensure the project team has a good understanding of the impact of any delays in one part of the schedule on commitments to agencies. Provide adequate buffers, to the extent possible, to avoid schedule disruptions.

   If the project is unable to meet projections, then a bow-wave of work will be produced which may be impossible to complete in the time frame allotted, and which may result in eroded credibility from participating agencies.

2. Update the project charter to clarify project benefits and bring into alignment with Service Level Agreement.

   The existing project charter shows one benefit as providing 100% uptime for email services. The Service Level Agreement has a commitment for very significant uptime (99.5%), but does not offer the highly unrealistic 100% guarantee.

3. Ensure that sufficient knowledge transfer is occurring between contracted vendors and DIS.

   The implementation and subsequent maintenance of a comprehensive, integrated enterprise email system requires significant technical skill. DIS staff have strong technical skills, and are working with external vendors during the implementation phase. There are no current issues identified related to knowledge transfer. This recommendation serves as a best practice reminder to ensure that knowledge transfer is ongoing throughout the project. We encourage technical staff to invest the time and energy to completely understand the proposed vendor solutions, and to build a broad base of competencies while the external vendor resources are on the project.

4. Recommend that Maintenance and Operations gather, monitor and address service metrics as identified in the Service Level Agreement on a regular basis to ensure that their capacity for support is sufficient, given the high volume of planned mailbox migrations in the next four months.

   The volume of mailbox migrations scheduled over the next four months may have an adverse impact on the team responsible for post-implementation support. Gathering and monitoring metrics early will help DIS understand call volume and service delivery quality, and make adjustments accordingly. Briskin Consulting will evaluate maintenance and operations functions in subsequent monthly QA cycles.

5. Initiate periodic formal risk and issue assessment meetings.

The project manager is maintaining both a risk and issue log, which is accessible to the whole project team. Individual issues are being managed effectively. However, review and maintenance of those logs occurs informally, on an irregular schedule. Briskin Consulting recommends that all Level 2 and 3 projects have regularly scheduled risk and issue assessment meetings with appropriate staff, and involve QA in those meetings if possible.
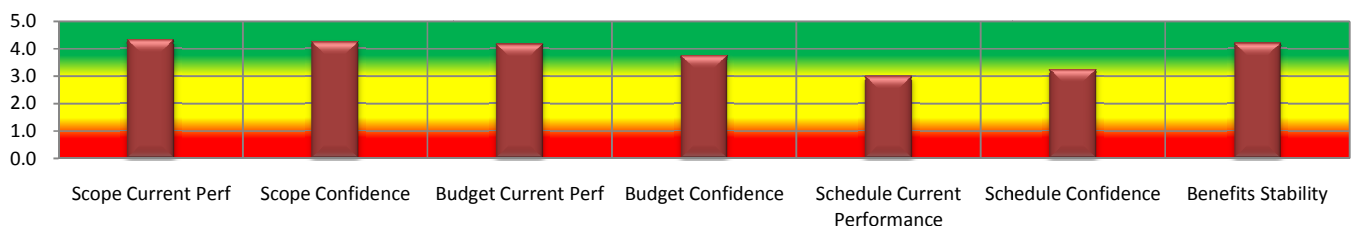
**Baseline Performance Assessment**
*Will the approved investment of money and time to complete the scope deliver the benefits and outcomes as promised?*

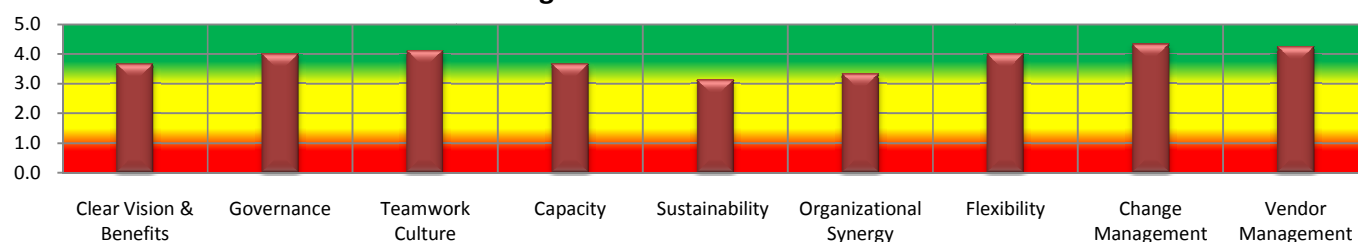| Success Factors | QA Observations – Strengths and Challenges |
|---|---|
| **Scope Stability –** *Scope is well defined and baselined, churn is low, and changes are managed.* | **Strengths:** Current baseline performance for scope, budget and benefits are strong. The scope is clear, well documented and understood by all. |
| **Scope Confidence –** *Looking ahead, it is likely that the scope will be delivered as planned.* | |
| **Budget Stability –** *Budget is well defined and baselined, churn is low, and changes are managed.* | Changes are carefully controlled. One pending change order exists, which addresses the most frequent customer request – to incorporate ActiveSync services in addition to Blackberry synchronization, which will allow users to synchronize email on other mobile devices, like iPhones and Droids. As a side note, project leadership sought volunteers from the user community to assist in developing model policies for use of personal devices. Response was strong. This was a great way to continue to involve users in the project. |
| **Budget Current Performance –** *Current baseline spending is consistent with plan and value delivered; estimates have been realistic.* | |
| **Budget Confidence –** *Looking ahead, it is likely that the budget will be expended as planned.* | |
| **Schedule Stability –** *Schedule is well defined and baselined, churn is low, and changes are managed.* | |
| **Schedule Current Performance –** *Milestones in recent months have been completed on schedule and estimates have been realistic.* | |
| **Schedule Confidence –** *Looking ahead, it is likely that milestones will be met as planned.* | **Challenges:** There is an aggressive implementation schedule, with 72% of the total implementations planned for September – December. The Secure Email RFP was cancelled and reissued, resulting in further delays on that aspect of the project. The Secure Email RFP is not on the critical path. |
| **Benefits Stability –** *Benefits are well defined, churn is low, and any changes consider impact on benefit.* | |
| **Benefits Confidence –** *Benefits expected of the project are likely to be delivered as a result of project efforts.* | |

**Baseline Performance Success Factors**

**Organization Support Success Factors Assessment**

*Is the organization environment the project is part of supporting its success?*

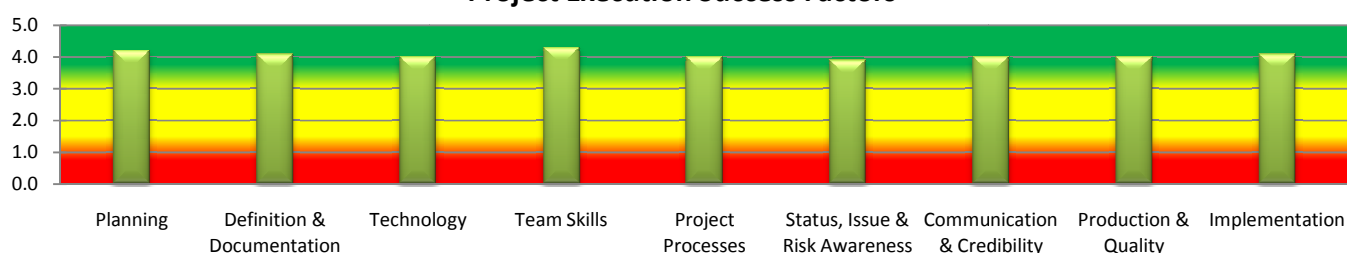| Success Factors | QA Observations – Strengths and Challenges |
|---|---|
| **Clear Vision and Benefits –** *The organization and stakeholders have a clear shared vision of the business outcomes, priorities, and benefits* | **Strengths:**<br>Teamwork is excellent. Members of the project are working well together, solving issues, efficiently coordinating shared work, and collaborating regularly. All seem sincerely invested in meeting and exceeding customer expectations.<br><br>The project team is doing a good job helping with change management. There are multiple business processes, policies and responsibilities which are changing for participating agencies because of the project. The team is assisting customers understand and work through the necessary changes at the agency level, as well as at DIS.<br><br>**Challenges:**<br>While there are no significant challenges in this area, we will be paying attention to organizational capacity for both pre- and post-implementation support. It appears that staffing levels are sufficient, but this will require more examination. Knowledge transfer is occurring; we will continue to monitor this to ensure that DIS is maximizing the value of their vendor relationships. |
| **Governance –** *There are complementary governance and project structures that prioritize resources, make decisions, and solve problems* | |
| **Teamwork  –** *Trust, problem solving, commitment, accountability, and collaboration are supported by the organization and in evidence on the project* | |
| **Capacity –** *The organization has and provides the leadership, resources, skills, and experience to address the work and risk of the project* | |
| **Sustainability –** *There is a long term view of achieving benefits and supporting the changes and new operations resulting from the project* | |
| **Organizational Synergy –** *The organizational units involved  work together to support one another's needs and ensure project success* | |
| **Flexibility –** *Projects are allowed to learn and adjust scope or approach to address changes, risks, and opportunities to improve results* | |
| **Change Management –** *There is recognition and support of needed  change to policy, practices, or attitudes to achieve business benefits* | |
| **Vendor Management –** *There are functions and skills to procure, contract, and manage productive vendor relationships* | |

**Organization Success Factors**

**Project Execution Success Factors Assessment**

*Is the project performing effectively in managing resources and risk, and delivering value?*

| Success Factors | QA Observations – Strengths and Challenges |
|---|---|
| **Planning –** *Tasks, estimates, dependencies, and resources form a realistic plan that allows collaboration, tracking, and adjustments.* | **Strengths:** DIS has professional project management in place. The project leadership is using best practices for monitoring and controlling the project. |
| **Definition and Documentation –** *Deliverables, requirements, designs, decisions, and standards are well defined and accessible when needed.* | |
| **Technology –** *Technology applied reflects appropriate application and validation of tools, infrastructure, architecture, and methodologies.* | The team as a whole has all the skills necessary to accomplish the goals of the project. We note that virtually all of the project team has strong and balanced technical, business and interpersonal skills. |
| **Team Skills –** *Business, technical, management, and leadership skills are available as needed and mesh effectively.* | |
| **Project Processes –** *Processes appropriate to the work bring together participants in consistent, organized, and productive collaboration.* | Project processes are consistently applied and work well. |
| **Status, Issue, and Risk Awareness –** *Timely and objective assessments of status, issues, and risks lead to effective action and decisions.* | **Challenges** There are no significant challenges related to project execution, however, we recommend that project leadership establish regular formal risk and issue assessment meetings, involving appropriate personnel. |
| **Communications and Credibility –** *Honest consistent communication builds trust, confidence, integrity of actions, and stakeholder support.* | |
| **Momentum and Velocity –** *The project persistently builds momentum and velocity toward clear and achievable milestones.* | |
| **Production and Quality –** *Project work is completed in a predictable high quality manner including technical and business driven testing.* | |

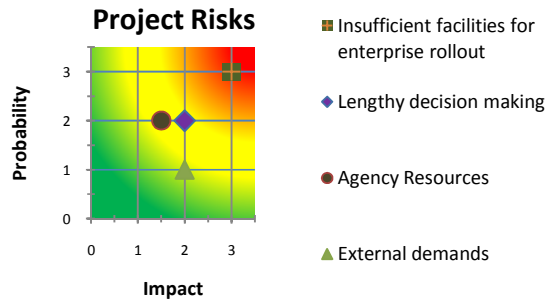**Project Execution Success Factors**

**Risk Tracking**

*What could happen that could affect the project's level of performance and outcomes?*

*This section reports critical risks to project success that are or should be under management by the project's management team, based on QA analysis. Not all risks identified by the project are reported here.*



| Risk/Impact | Probability Level *(1=Low, 3=High)* | Impact Level *(1=Low, 3=High)* | Mitigation Status/Comments |
|---|---|---|---|
| **Risk: Insufficient facilities for enterprise rollout** The Spokane data center is at maximum capacity for existing power, space and HVAC systems. The infrastructure needs to be built out in order to accommodate the equipment necessary for the project to be fully redundant. **Impact:** The system currently resides at a single data center in Olympia, offering no business continuity or disaster recovery functions in the event of a catastrophic event. | 3 | 3 | Work is being done to expand the capacity of the Spokane data center. It is likely this risk will be completely addressed within a month or two. |
| **Risk: Lengthy decision making** Many project decisions involve inter-agency coordination. The DIS transition could impact decision timelines. **Impact:** Decision delays can impact the project schedule. | 2 | 2 | Project leadership is addressing this risk, and seeking cooperation among decision makers. |
| **Risk: Agency resources** The project depends upon external agency resources, schedules and priorities to meet implementation timelines. **Impact:** Agencies who do not have sufficient resources, or who change their implementation schedule will cause the project to fail to meet their implementation projections. | 2 | 2 | Agency liaisons will work with agencies to help them understand the critical need to stay on schedule, once commitments are made. |
| **Risk: External demands** External demands can pull resources away from project activities. **Impact:** Schedule and quality could be impacted. | 1 | 2 | This risk is being actively managed. As much as possible, project resources are assigned full time to the project, and are physically relocated to new project |

| Risk/Impact | Probability Level *(1=Low, 3=High)* | Impact Level *(1=Low, 3=High)* | Mitigation Status/Comments |
|---|---|---|---|
| | | | workspace. |

*Risk scoring is applied to impact and probability levels. Impact represents how much realization of a risk might affect achieving project objectives. For example, on this project, if a subproject exceeds its allotted time, overall the project may have to cut scope which would undermine delivering on its objectives. Probability level represents the present estimation of how likely the risk is to occur. A high probability score would indicate a high likelihood – say greater than 80% - that the risk will turn into a real problem for the project.*

**Issue Tracking**

*What has happened that is affecting the project's level of performance and outcomes?*

*This section reports issues that impact project success that are or should be under management by the project's management team, based on QA analysis.  Not all issues identified by the project are reported here.*

| Issue/Description | Status | QA Analysis |
|---|---|---|
| Secure Email RFP needs to be re-issued, which is causing a delay in that part of the project, but is not impacting the core migration activities. | Active | The project team is actively managing this issue. All the vendors who previously submitted a response asked for a debriefing conference, which has been completed. The RFP will be re-issued, probably in September, with clearer instructions. |
| Application Integrations: Approximately 8 agencies have not submitted information regarding their integrated applications. | Active | Most agencies have one or more applications that integrate with their email system in some way. The project team is working with the remaining agencies to obtain information about the integrated applications. QA will follow up with selected specific agencies next cycle if this issue remains active. |
| Outside outage issues (data center, network) have impact on SSEP SLA and customer perceptions. | Active | SSEP has been impacted twice by external events that have caused down-time in the past two months. Both of these events have been unrelated to the project, but for the most part, end users do not understand that distinction. Establishing a complete failover site in Spokane will help reduce the likelihood that this will occur again. |

# Appendix 1:  Baselines and Recommendations History

**Scope and Schedule Baselines**
*The table below itemizes the scope of work and shows the schedule from the project which can be considered to be the current schedule baseline.*

| Key Milestone/Deliverable | Planned Finish Date | Actual Finish Date | Finish Variance (work days) |
|---|---|---|---|
| Blackberry Ready for 1st Agency | 2/1/2011 | 2/1/2011 | 0 |
| Exchange 2010 Ready for 1st Agency | 5/16/2011 | 5/16/2011 | 0 |
| Phase 1 DIS Readiness Complete | 5/23/2011 | 5/23/2011 | 0 |
| Service Level Agreement Finalized | 5/27/2011 | 7/13/2011 | 34 |
| Secure Email Ready for 1st Agency | 8/22/2011 | | |
| Vault System Ready for New Customers | 9/28/2011 | | |
| Agency Implementations 25% Done (16,500 mailboxes) | 10/30/2011 | | |
| Agency Implementations 50% Done (33,000 mailboxes) | 11/30/2011 | | |
| Agency Implementations 75% Done (49,500 mailboxes) | 12/30/2011 | | |
| Agency Implementations 100% Done (66,000 mailboxes) | 6/30/2011 | | |
| Project Close | 7/30/2012 | | |

| Implementation Activity | Planned Migrations | Actual Migrations | Cumulative Variance |
|---|---|---|---|
| May-11 | 497 | 859 | (362) |
| Jun-11 | 916 | 1826 | (1,272) |
| Jul-11 | 3,949 | 1308 | 1,369 |
| Aug-11 | 3,876 | 973 | 4,272 |
| Sep-11 | 2,310 | | |
| Oct-11 | 17,301 | | |
| Nov-11 | 18,868 | | |
| Dec-11 | 9,399 | | |
| Jan-12 | 5,835 | | |
| Feb-12 | 523 | | |
| Mar-12 | - | | |
| Apr-12 | 232 | | |
| May-12 | 5,100 | | |
| Jun-12 | 4,412 | | |
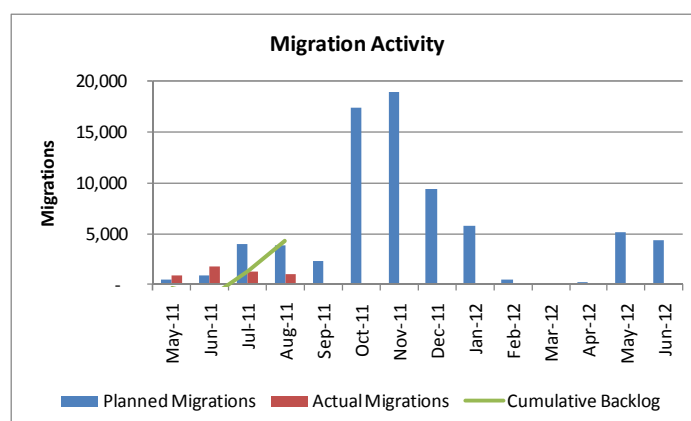
**Benefits Baseline**

*What business benefits and objectives are sought, and is the project on track to achieve them?*
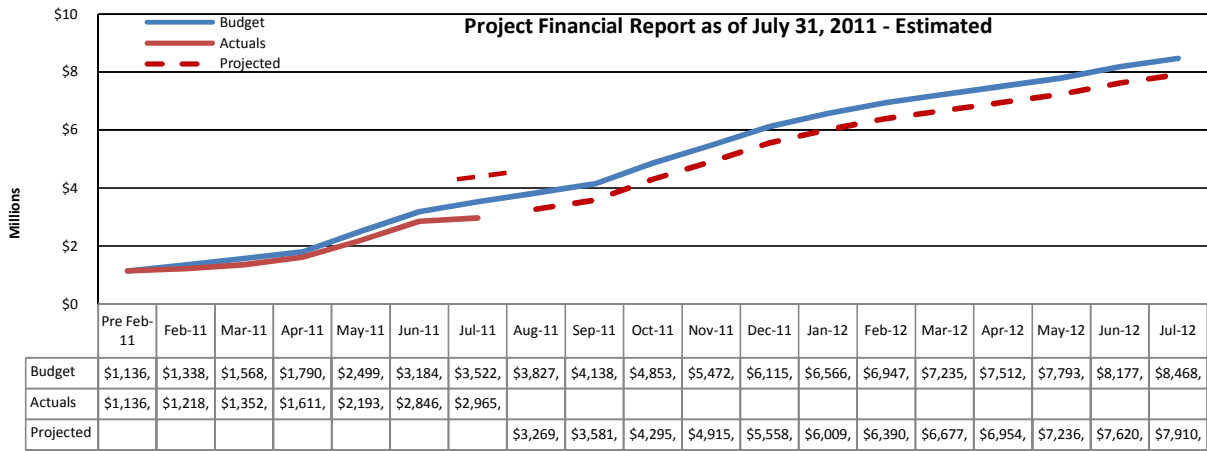
*The table below itemizes the business benefits and objectives expected from the project as described by the project charter. This can be considered to be the current benefits baseline.*

| | Proposed Business Benefit/ Objective | Current Status |
|---|---|---|
| 1. | Provide a standard service level agreement that will be developed prior to hosting any agency on the new system. | In scope |
| 2. | Provide access to more efficient, cost effective, secure storage for every user. | In scope |
| 3. | Provide improved records management, search capability and compliance with records management statutes for file retention and public disclosure. | In scope |
| 4. | Provide the capability to protect the confidentiality and integrity of sensitive data. | In scope |
| 5. | Provide reliable, open application interfaces to allow agencies to meet their business needs. | In scope |
| 6. | Provide a transition strategy for agencies to minimize risks and impacts. | In scope |
| 7. | Provide new opportunities to enhance multi-agency workflows and processes through a single platform and application interfaces. | In scope |
| 8. | Provide a single statewide solution which guards against spam, email viruses, malware and inappropriate language that poses a risk to agency operations. | In scope |
| 9. | Provide a single, secure remote access method to the state email system for authorized users. | In scope |
| 10. | Provide secure access to the state email system for authorized devices, while accounting for the differences in agency capability and infrastructure. | In scope |
| 11. | Provide a solution that complies with all ISB policies and standards. | In scope |
| 12. | Identify agency requirements for the system interface prior to deployment, and assess customer satisfaction following implementation to ensure a good fit between agency needs and the project solution. | In scope |
| 13. | Provide an email system that is available 100%[2] of the time, given limitations to infrastructure. | In scope |
| 14. | Provide the opportunity to refocus agency resources on core business functions, instead of on email maintenance. | In scope |
| 15. | Provide a competitive rate that delivers a return on investment for the state within 5 years. | In scope |
| 16. | Implement the solution in all executive branch agencies, and make it available to other state agencies based on the approved project plan. | In scope |
| 17. | Provide a single-source solution hosted in the state data center. | In scope |

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[2] While the current project charter indicates 100% uptime, the service level agreements negotiated with the agencies show 99.5% uptime, which is more realistic. We recommend that the project charter be revised to bring the uptime goals in line with the SLAs.

## Quality Assurance Initial Assessment – DIS Shared Services Email Project

**Budget Baseline**



| | Pre Feb-11 | Feb-11 | Mar-11 | Apr-11 | May-11 | Jun-11 | Jul-11 | Aug-11 | Sep-11 | Oct-11 | Nov-11 | Dec-11 | Jan-12 | Feb-12 | Mar-12 | Apr-12 | May-12 | Jun-12 | Jul-12 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Budget | $1,136, | $1,338, | $1,568, | $1,790, | $2,499, | $3,184, | $3,522, | $3,827, | $4,138, | $4,853, | $5,472, | $6,115, | $6,566, | $6,947, | $7,235, | $7,512, | $7,793, | $8,177, | $8,468, |
| Actuals | $1,136, | $1,218, | $1,352, | $1,611, | $2,193, | $2,846, | $2,965, | | | | | | | | | | | | |
| Projected | | | | | | | | $3,269, | $3,581, | $4,295, | $4,915, | $5,558, | $6,009, | $6,390, | $6,677, | $6,954, | $7,236, | $7,620, | $7,910, |

**Findings and Recommendations History**

*How can the performance of the project be improved?*

| # | Date Created | F/R | Finding/Recommendation | Current Status* and Comments |
|---|---|---|---|---|
| 1. | 9/1/2011 | R | Carefully monitor migration progress, especially in September and October to ensure that the project meets projections. Ensure the project team has a good understanding of the impact of any delays in one part of the schedule on commitments to agencies. Provide adequate buffers, to the extent possible, to avoid schedule disruptions. | New |
| 2. | 9/1/2011 | R | Update the project charter to clarify project benefits and bring into alignment with Service Level Agreement. | New |
| 3. | 9/1/2011 | R | Ensure that sufficient knowledge transfer is occurring between contracted vendors and DIS. | New |
| 4. | 9/1/2011 | R | Recommend that Maintenance and Operations staff gather, monitor and address service metrics as identified in the Service Level Agreement on a regular basis to ensure that their capacity for support is sufficient, given the high volume of planned mailbox migrations in the next four months. | New |
| 5. | 9/1/2011 | R | Initiate periodic formal risk and issue assessment meetings. | New |
| 6. | | | | |
| 7. | | | | |
| 8. | | | | |

*\* Status:  New, In Progress, Delayed, or Done*